How to Access the Supplier Portal

Description: This Quick Guide describes the steps necessary to access supplier data in order to check the status of your Purchase Orders and Invoices or check the status of your Payments. Users can also review the supplier contact and banking information.

Initiator: Workday Supplier Portal User

Approver(s): Not Applicable

Note: Prior to completing this process, follow these log-in instructions:

Access the Supplier Portal:

User ID: Enter your email address.

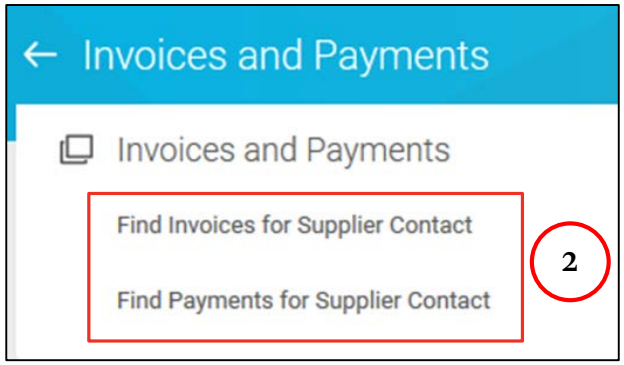
Password: Once you enter the initial password provided, you will be prompted to create a new password.

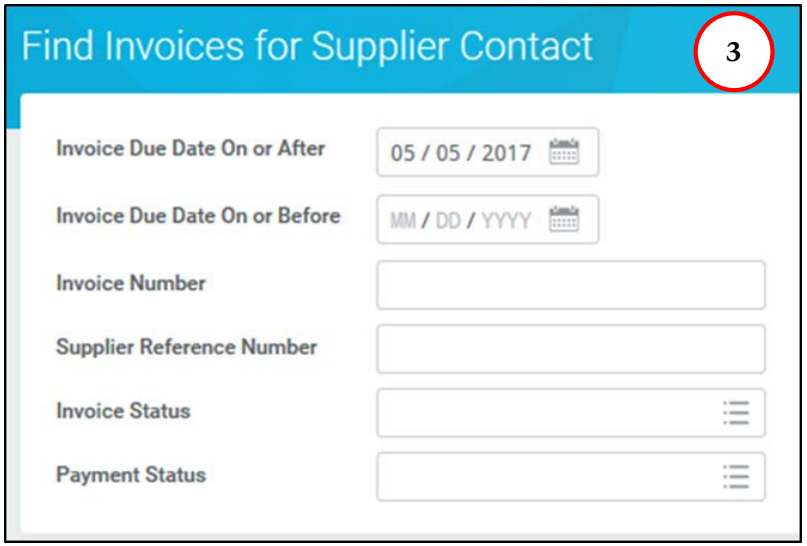
If you need assistance with your username or password, contact supplier.change@yale.edu.

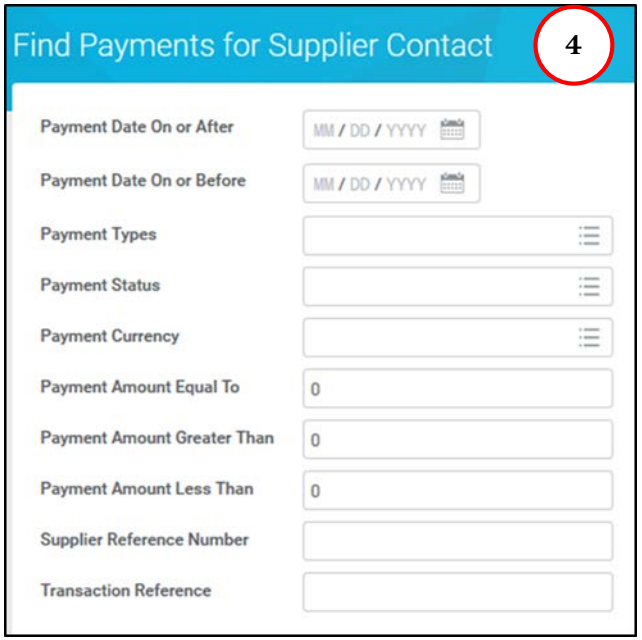
How to Access the Supplier Portal (cont.)

Steps to view your invoices and payments:

1. Click on **Invoices and Payments** worklet.
2. On the **Invoices and Payments** screen, choose **Find Invoices for Supplier Contact** or **Find Payments for Supplier Contact.** User can also open individual worklets: **Most Recent Invoices** or **Most Recent Payments**.
3. The following screen appears if **Find Invoices for Supplier Contact** is chosen:
4. The following screen appears if **Find Payments for Supplier Contact** is chosen (go to step #8):



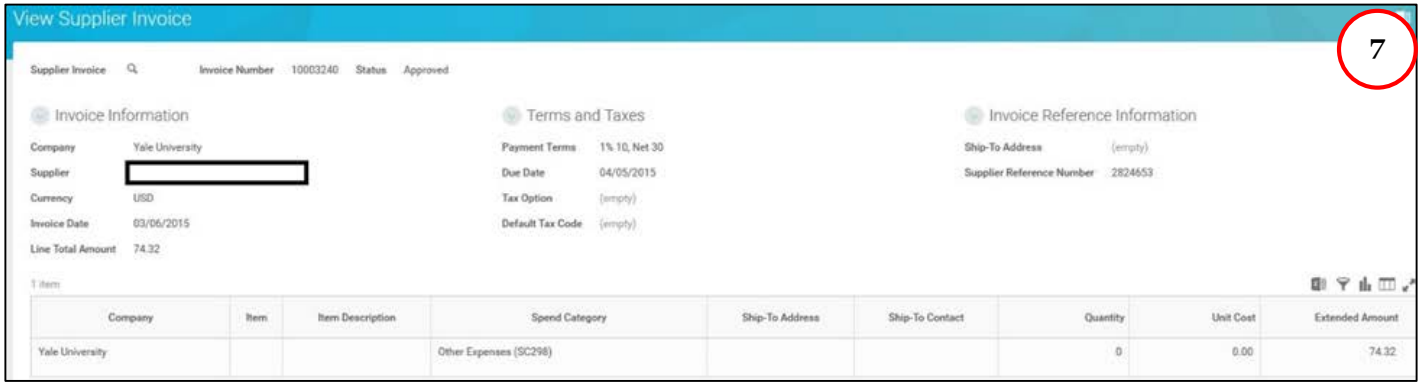




How to Access the Supplier Portal (cont.)

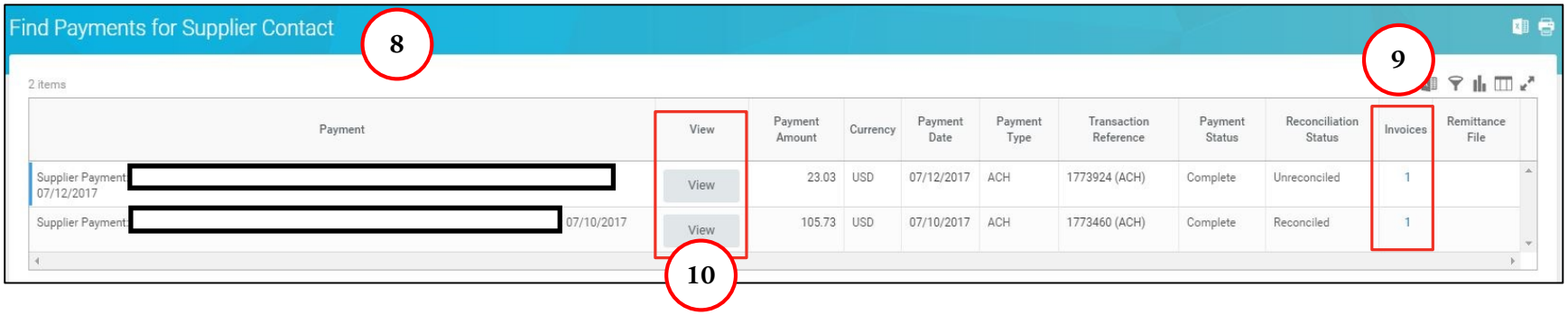
5. For **Find Invoices for Supplier Contact –** Enter search criteria and click **OK**. If searching for a specific invoice number, enter it as the Supplier Reference Number.
6. Click on the **Supplier Invoice Number** (highlighted in blue) to open Supplier Invoice. User can also hover the mouse next to the Invoice Number and click on **Related Actions** icon to view invoice details without navigating away from the screen.

7. User can click on any invoice number to open the Invoice record in full screen.



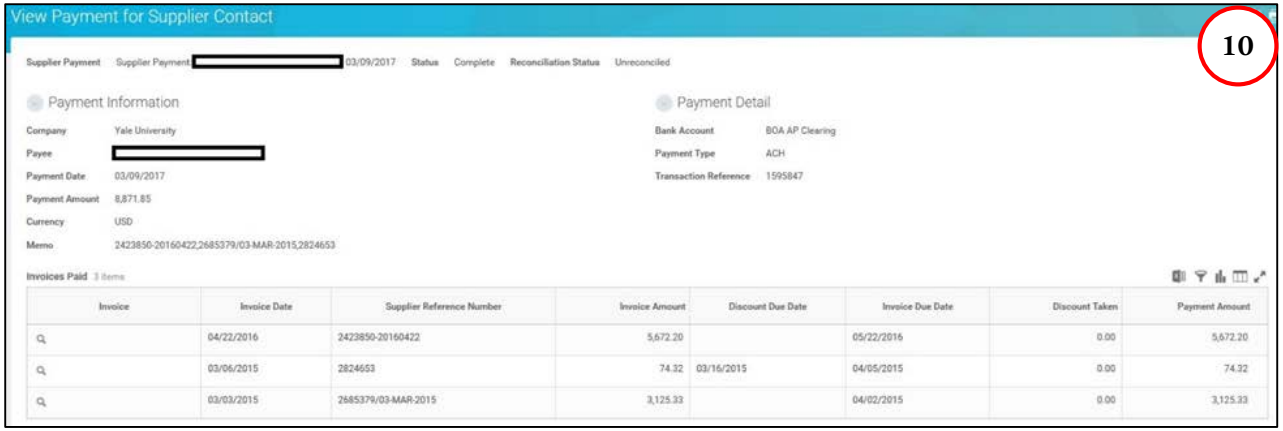
How to Access the Supplier Portal (cont.)

8. For **Find Payments for Supplier Contact:** Enter search criteria and click **OK;** a list of payments will appear with details.



Payment	View	Payment Amount	Currency	Payment Date	Payment Type	Transaction Reference	Payment Status	Reconciliation Status	Invoices	Remittance File
Supplier Payment [redacted] 07/12/2017	View	23.03	USD	07/12/2017	ACH	1773924 (ACH)	Complete	Unreconciled	1	
Supplier Payment [redacted] 07/10/2017	View	105.73	USD	07/10/2017	ACH	1773460 (ACH)	Complete	Reconciled	1	

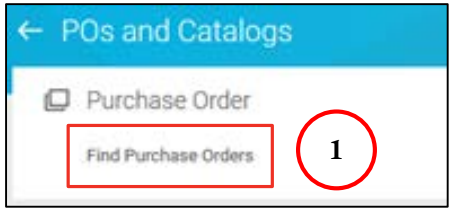
9. User can click on the number in the **Invoices** column to see invoices that are included in the specific payment.
10. User can also click on **View** for a specific payment in the payments list. That will present details of specific Invoices being paid via the payment:



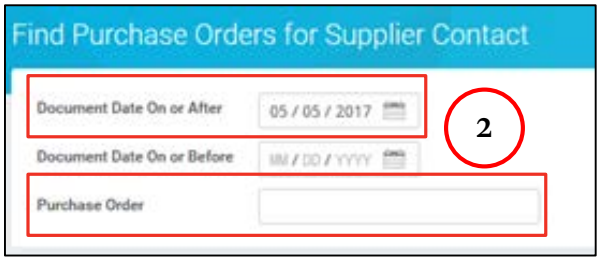
Invoice	Invoice Date	Supplier Reference Number	Invoice Amount	Discount Due Date	Invoice Due Date	Discount Taken	Payment Amount
	04/22/2016	2423850-20160422	5,672.20		05/22/2016	0.00	5,672.20
	03/06/2015	2824653	74.32	03/16/2015	04/05/2015	0.00	74.32
	03/03/2015	2685379/03-MAR-2015	3,125.33		04/02/2015	0.00	3,125.33

How to Access the Supplier Portal (cont.)

Steps to view your purchase orders:



1. Type **Find Purchase Orders** in the **Search** box or click on the **POs and Catalogs** worklet.
2. Enter the following information to narrow down your search:
   - Date On or After; or
   - Purchase Order number
   - **Note:** Purchase Orders created prior to July 1, 2017 were converted to a new PO Number. Only the remaining balance was converted. To search for those POs, you may want to base your search on a date range (i.e., Document Date On or After MM/DD/YYYY and On or Before MM/DD/YYYY). If search criteria is not entered, all POs will be returned.



3. Click **OK** on the bottom of the screen.
4. Click on **specific PO** to view details.